

**LOCAL HEALTH DEPARTMENT  
PERSONNEL SYSTEMS REFERENCE  
FOR PERSONNEL ACTIONS**

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# Local Health Department Personnel Systems Reference

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# **LOCAL HEALTH DEPARTMENT PERSONNEL SYSTEMS REFERENCE**

## **I. INTRODUCTION AND EXPLANATION OF THE PERSONNEL REFERENCE MANUAL**

### **A. Purpose of Procedural Manual**

1. Developed to serve as a tool to assist those individuals who have a role in initiating personnel actions for employees, maintaining employee records, and analyzing information regarding employees, interpreting personnel regulations and policies.
2. Document should be user friendly in terms of assisting you in the personnel functions of your agency.
3. Designed to reference and incorporate pertinent parts of the personnel administrative regulations and a description of the automated system to fully explain a personnel action.

### **B. Overview of the Automated Personnel System**

1. Uses the Custom Data Processing (CDP) statewide network that is the same networking system that all health departments utilize for entering patient service information.
2. The Automated Personnel System consists of two major parts
  - A. Automated Register System
  - B. Automated Personnel System

### **C. Presentation of Procedural Manual**

1. Designed to follow the normal recruitment, appointment and employee maintenance process.
2. Begins with a position that needs to be filled and proceeds through the advertising, examination, establishment of a register, requesting a certification, and the appointment of an individual. This manual describes personnel actions that are available.

### **D. Routine reports that are available to the Local Health Departments:**

Following are the instructions for log-on and how to handle your reports each morning:

## LOGON PROCEDURE:

\*\*(f12)  
/signon,ky000(whatever your ky number is) (F12)  
Password: 00000 (F12)  
/SRI-NDL (F12)

F12 =	Transmit
F11 =	Inquiry/Advance to next page
F10 =	Clears the information bar at the bottom of your BRIDGE screen.
Client =	Always 30 (code for Kentucky)
(sp) =	In this manual this means space
CTRL Home =	Takes your curser to the top left of the screen
Page up =	Allows you to get a new screen without disruption to the current screen you are working on when additional information is needed.

## HOW TO QUE PRINTER:

Queue printer to 12 -	YQP (SP printer # (sp) 12 and transmit.
To Un-queue printer -	YQP (sp) printer # (sp) 2 and transmit.
To empty Queue*	*YQZ (sp) printer # and transmit.

\*If printer has not been queued in a while, you may have page after page of transactions stating action too old to print.

## REPORTS:

Each morning as you sit down to your CRT, if you type:

YIAI and Site # then transmit on a clear screen at the top of the page a screen will come up telling you what reports are available to you for daily/weekly/monthly reports etc. that you need to print out for that day.

Review daily the date and time created column. If this date is a current date (always have to poll overnight so it will reflect the prior days date) you would need to print out the report.

On the far right hand side of the screen, you will notice the printed column. Once you have printed the report a Y is system loaded to reflect that you have printed that report.

## **ACTIVE EMPLOYEE REPORTS:**

**817** This is a current pending list of personnel actions that have been entered on the CDS555 screen and is pending for LHP to approve the pending paperwork that was submitted.

**861** This is the approved official hard copy of Personnel actions that have been approved by Frankfort. (P2).

Note: The Appointing Authority signs the official copy and a copy is always provided to the employee. This can be given to the employee by Mail or a sealed envelope during the work day. A copy is always to be placed in the employee folder.

If you have missed printing an "official" P2 you may follow the instructions to queue your printer and follow the instructions below:

- (1) On blank BRIDGE screen type MCNM (sp) 30 (sp) co/dist# (sp) first-initial (sp) last name.
- (2) Find the name you want and put a S (P2 summary) in the block in front of the name.
- (3) Find the P2 you wish to print and put a P in the block in front of P2 summary you wish to print.

**834** This report is the report for your upcoming probationary increments (Initial and promotional).

This report is system generated the first Tuesday of the month – for increments that are due in one month and the report is only available to print from bridge for one week. This report was developed to notify Supervisors that evaluations are due to determine if requirements are met.

- (1) Frankfort Personnel must be notified fourteen (14) days in advance of the probationary increment is approved or denied. If the increment is denied, a copy of the evaluation along with a copy of the letter to the employee must be sent to Frankfort.
- (2) If the increment is going to be denied, the employee must be notified in writing seven (7) days in advance.
- (3) The initial probationary is always 5%. If there is a promotion while on initial probationary and the employee starts over with their probationary time due to the promotion, the promotional increment would be 5% instead of the normal 3% promotional probationary increment.

**833** This report is the report for your upcoming annual increments.

- (1) If your agency is following evaluation Regulation 080 – this report will automatically generate on the Tuesday a week prior to the due date. If this increment is going to be denied, you must submit a copy of the evaluation to Frankfort. If the employee's annual increment is denied you must reevaluate the employee in ninety (90) days and if the employee has improved and due the evaluation, they may receive the increase in salary for the remainder of the year.
- (2) If your agency is following evaluation Regulation 096 – the personnel employee at your agency would enter the annual evaluation. If the employee is reevaluated within 120 days see regulation 902 KAR 8:096, Section 9 for the remainder of the increment details. Personnel must be notified fourteen (14) days in advance of any changes or denials.

**921** This report is a current employee profile listing and is generated the first Tuesday of every month and is only available to print for one (1) week. This report provides a listing of all active employees on the BRIDGE system with the classification title, increment dates, current salary, and other important data. This report can also be used to compare with payroll to denote discrepancies for maintenance of personnel files.

## **REGISTERS AND APPOINTMENTS:**

**402** This report was generated by the MCIH screen at agency level and is pending for personnel approval. This is an Incomplete Certification report.

- (1) If you have advertised and mailed the applications to LHD personnel you may enter this screen in advance, however it will remain on pending until LHD personnel has processed all the applications and letters have been verified as mailed.
- (2) If you are re-requesting a register that was used earlier in the year, you must notify your assigned Human Resource Administrator via e-mail to re-complete the certification request for you.
- (3) If you are on open register for the classification you requested,



do not enter the MCII request until you are sure that all applications have been worked by LHD Personnel and verified as processed. You may verify if the applications have been worked by entering MCII 30 SS# for each application. Open register will not pend for approval and a report 411 will be automatically generated the next day.

- 411** Certification of Eligibles – This is a certified register that has applicant names pending the interview process. The top of the certification will have the expiration date and must be completed within sixty (60) days.
- (1) This should be printed and only the applications for those that appeared should be pulled and provided to the interview committee.
  - (2) After the interviews are conducted the codes are entered from the BRIDGE manual and provided back to HR for entry onto the certification.
  - (3) If you missed printing a certification you can use the following command to print a missed certification **MCIC (sp) Y (sp) 30 (sp) co/dist (sp) Cert # F12.**
  - (4) After completed a report 889 will print the next day, if incomplete a report 403 will generate.
- 403** This report is an incomplete certification request. This means that there may have been some additional information left off of the certification and you will need to contact your LHD HR Administrator in Frankfort for help in completing this.
- 889** This report shows the appointment date and is generated the following day after the MCIC is completed by the agency. This may be completed prior to the appointment date. If the applicant fails to show or date of appointment is postponed contact your HR administrator in Frankfort for assistance in updating the disposition.

#### **FINANCIAL/PAYROLL REPORTS:**

- 1817** This is an audit of payroll verses Personnel and provides you with data that doesn't match such as name, address, salary, exempt status, etc.. Please be sure that these discrepancies are resolved timely.

**153** This is a summary of accrued hours and provides you with leave balances used and balances ongoing along with the weeks of service to date.

**130** This report gives you the actual pay issued per pay period.

#### **TO LOOK UP AN INDIVIDUAL CLASSIFICATION:**

Type **MRIK** (sp) 30 (sp) the four-digit computer code for a specific classification and then transmit. This screen gives you the individual classification, minimum requirements for that classification, ID prefix number and other statistical facts about the classification.

#### **TO LOOK UP ALL CLASSIFICATIONS:**

Type **MRIK** (sp) 30 (sp) All. This screen gives you a listing of all classifications and their respective computer codes. The current active classifications start with 100, the beginning codes on this screen will be obsolete codes that you may need in the event that a history action on CDS555 would need to be entered. History actions are explained later in this manual.

#### **TO LOOK AT AN INDIVIDUAL EMPLOYEE:**

Type **MRIE** (sp) 30 (sp) Health Department # (sp) SS# of employee. This screen will provide a Master Inquiry on an employee.

#### **TO LOOK UP A LISTING OF ALL EMPLOYEES IN YOUR HEALTH DEPARTMENT:**

Type **MRNM** (sp) 30 (sp) Health Dept. # (sp) All and transmit. This screen will give you a listing of all health department employees both active and inactive since 1988. There are commands at the bottom of the page that can be used. You can look at the P-2 or print the P-2 summary. You can also use this screen to look at an individual employee record and obtain a report 861. If you want to look at a certain individual record without going through the whole list, you would type **MRNM (sp) 30 (sp) Health Dept. #** and the employee name and transmit. It will take you to that individual record.

#### **TO LOOK UP INFORMATION ON YOUR HEALTH DEPARTMENT:**

**MRIH** (sp) 30 (sp) health dept # and transmit. This screen will provide information on the health department such as above minimums that have been established, address, phone #, appointing authority, open classes, etc. Please check this screen regularly to make sure you have the correct information on your agency. Any changes in above the minimums, open classes, etc., need to be sent to the Local Health Personnel office in

writing which may be done via e-mail to the appropriate HR Staff member assigned to your agency.

#### **LISTING OF ALL PERSONNEL ACTIONS:**

**MRIA** (sp) 30 (sp) All and transmit. This screen will give you a listing of personnel actions and their computer code. These action codes are used in requesting specific personnel actions for an employee.

#### **TO LOOK UP WHAT POSITION NUMBERS YOU HAVE USED FOR A CLASSIFICATION:**

Type **MRIO** (sp) 30 (sp) health dept. # (sp) four digit classification. This screen will give you the listing of your employees for the individual classifications, the position number they occupy, and the current salary. It tells you what vacant number you have if any and lets you know which position number needs to be established to accommodate your personnel request.

This screen is a valuable tool for health departments to use when considering establishing an above minimum. By calling up this screen, it will tell the health department what employees they have in the classification and the current salary of each employee. If the salary for the employee is below the above minimum being considered, these employees will receive a salary adjustment to the new above minimum established for the classification. This screen may be helpful in contemplating budgets.

**If all your available position numbers are filled, type in CDS552 and establish a new position number. This screen can also be used to update all information on those position numbers.**

## **II. RECRUITMENT OF APPLICANTS FOR A POSITION**

- A. *A statement from administrative regulations 902 KAR 8:070, Section 1 states that “for those job classifications in which there is expected to be a considerable and recurring need of eligibles, the Department, with the advice of the Council and the local health departments shall establish a recruitment program which shall be both positive and continuous.”***
- B. *Unless there is an existing register, a health department is required to announce the availability of the position to one or more public sources such as public officials, employment service offices, newspapers, educational institutions, professional/vocational societies, other media, individuals and organizations as the health department deems necessary.***

- C. Advertisement templates for all classifications can be found at <http://chfs.ky.gov/dph/info/lhd/LocalHealthPersonnelBranch.htm>.

The templates include a long and a short version. The short ad is designed with the absolute bare minimum information that will save on advertisement costs when there is a cost associated with posting of a position and is designed to be used in conjunction with the long ad which would be posted to a website for the full qualifications. The long ad lists the full qualification as required by regulations and should be posted to either the Department for Public Health Website (no associated costs) or to your local agency website.

Please note that in order to make your salary more competitive and receive the maximum number of applicants, we suggest the advertisement include the minimum to midpoint as we have listed in the advertisement templates. However it is not mandatory.

- D. Determining if an applicant is qualified.

*All applications must be submitted to your local health department personnel office. **After the closing date of your advertisement**, please mail all applications with a copy of the advertisement to the Frankfort personnel office. After you have mailed the application and advertisement to Frankfort, you now can place the MCIH request on the system if this is a closed advertisement.*

***The personnel office will need at least ten (10) working days to evaluate applications, request additional information as necessary, and inform applicants if they are qualified.***

*If the position is an advertised position, the personnel office cannot take additional information on that application after the end-date of the advertisement.*

- E. Responsibility of Local Health Personnel Merit System Branch

1. Receives all applications for evaluation from the health department with a copy of the advertisement.
2. Upon receipt, records essential information for each applicant.
3. An assigned personnel staff person reviews and evaluates applications.

4. Evaluation determines applicant disposition: (1) Qualified; (2) does not qualify; (3) Request for more information to complete the evaluation process in the event your agency is on continuous open recruitment for that particular classification as indicated on the MRIH agency information screen.
5. Appropriate communication with applicant acknowledging evaluation action.
6. Enters completion of applicant information in automated system.

## **F. REQUESTING A CERTIFICATION**

**MCII** (sp) 30 (sp) social security number and transmit. This screen is for use after you have submitted applications to Frankfort as a result of an advertisement. You can check on the status of the applicant by typing the above command. It will let you know if the application has been processed and what status it is in.

When looking at this screen to tell the status of the applications, the following codes tell you the disposition for that applicant and the reason for that disposition:

### NEED MORE INFORMATION CODES

- 7-1 – Copy of official transcript needed
- 7-2 – Copy of GED needed
- 7-3 – Description of Vocational School Trainings
- 7-4 – Months/Years not indicated on application
- 7-5 – Number of hours not indicated
- 7-6 – Provide more details of duties
- 7-7 – Application needs to be signed
- 7-8 – Other-this will always include remarks in the letter

The above additional information codes will only be used if the classification is on continuous open recruitment.

### REJECTION CODES

- 2-1 – Lack of required education
- 2-2 – Lack of required hours
- 2-3 – Lack of required experience
- 2-4 – Other – this will always include remarks in the letter
- 2-5 – Lack of required degree

1. You must obtain a position number. Here are the steps for obtaining a number:
  - (a) You must know the four-digit computer code for the classification you will be working with. Let's use the four-digit classification code 2904 for these directions.
  - (b) Check to see if you have any vacant position numbers: Type in **MRIO** (sp) 30 (sp) Health dept. # (sp) 2904 and transmit. This will bring up a list of all the positions you have available and show if they are filled or vacant. If this page shows you have a vacant number, example 02 is vacant; you would use this position for your register request or personnel action (Item 11 on the CDS 555).
  - (c) If you need to establish a position, type in CDS 552 on a blank page.
  - (d) If you need to hire more than one applicant, you must use more than one position. If you use one vacant position, you can only hire one person.

Complete the blocks. Client is 30, Health department number. The action is "E" for establish. Enter the four digits for classification code 2904, then the next available number not used on your MRIO screen. Go to bottom of page and transmit. If the MRIO screen showed position 1, 2, and 3 filled, you would establish 04. If the screen shows position 1, 2, 3, and 5 as being filled but no position # 4, then you would establish position 04. Do not fill in the ID number (social security number) when establishing a position.

The only time you would use the ID number (social security number) on this screen is if you are doing maintenance work.

Once the applications have been processed, a certification of eligibles may be requested.

TYPE in the following command:

**MCIH** (sp) 30 (sp) Health Dept # (sp) County No. or "0" and \_ \_ \_ the four-digit classification number and transmit. If the classification is a District Level you would enter "0" in the county field. If it is not, you must enter the county number. (You must obtain your position number on the MRIO screen before typing this

command. You need to look at the classification to determine if the classification is requested on district level or county level. To look at the classification, you enter **MRİK** (sp) 30 (sp) the four-digit computer code and transmit.

There are two different certifications. There is an **open certification**, which means you have sent a letter to Frankfort asking to be placed on open register for a classification that is difficult to recruit for, and it has been approved by LHP. This allows the agency to accept applications continuously for this position. Just write OPEN REGISTER in red at the top of the application and send them to Frankfort daily. A **closed certification** (advertised position) means that your agency has advertised for that position and may only accept applications through the end date of the advertisement. If an application is dated after the end date of the advertisement, that application will be rejected.

All the blanks must be completed and then transmit. If you advertised the position and used dates on the MCIH screen, you must wait for Personnel to complete the register request. The information will be polled over night. If it is an open certification, leave the advertising dates blank, and you can request a 411 the next day. You do not need to wait on personnel to complete the register for you. It is automatically done by the system.

**The next day you need to request report 411.** This will give you the certification of eligibles, which lists those individuals qualified for the classification requested.

You will receive all names of the applicants that are qualified. You will only be allowed to appoint one employee per position number. Therefore if you need more than one employee, request the register for the number of positions you need to hire to fill your vacancies.

#### G. DURATION OF CERTIFICATION OF ELIGIBLE AND REGISTERS

1. A Certification of Eligibles expires within **sixty (60) days from the date of issue**. Upon completion of the interview process and no later than sixty (60) days an appointment should be entered for the selected individual and the date employment will begin (ALWAYS on the beginning payroll date) and enter a disposition code only as appropriate for the remaining names and transmit. Never enter dates for any disposition actions except for appointments. Otherwise a new register will need to be requested. If you have failed to enter the disposition during the lifetime of the register, you will need to call Frankfort and have them complete the disposition screen before another one can be requested.

Calling up the certification completes this process. 902 KAR 8:070 states that during

this time, a health department can evaluate the applicants, determine the applicants to be interviewed and make an offer of an appointment. Type MCIC (sp) 30 (sp) health dept. # (sp) and the certification number of your register and transmit. **At the beginning of a new calendar year, you will need to enter the four (4) digit year codes if the register was established in the previous year.** This will bring up the list of all names that appear on your report 411. A disposition code must be entered for each name.

The action codes to be entered are as follows:

- A Appointment.** Enter the letter "A", space over to the shaded area and enter the effective date of the appointment. Remember: beginning of payroll date.
- D Declined offer of appointment.** On action "Declined", you must have offered the applicant the vacant job and he/she turned it down. Keep documentation of this transaction. Space over to the first column and type in the letter "D".
- NA Not available** - On this action, the applicant responded that she is not available for an interview, or not interested in the job. Keep documentation of your conversations or correspondence or both.
- FR Failed to reply** - This action is used when you have written the applicant concerning an interview or availability, given a time frame for responding, and no response is received to your written inquiry. You should allow ten (10) working days for response time. Keep your documentation.
- FI Failed to show up for an interview** - This disposition is used when the applicant has been contacted for an interview and does not show up. Once again - keep your correspondence on file.  
  
It is important that you keep documentation. If the applicant calls and wants to know why you entered this disposition, you will have your information on file to justify your actions. The above codes WILL REMOVE an applicant from the register.
- I Interviewed** - This disposition is used when you have had the person in your office for an interview. Keep your notes concerning the interview so you have back up data as to when you interviewed the applicant.
- C Considered** - this disposition is self-explanatory.



"I" and "C" DO NOT remove a person from the register unless the applicant has been certified three times to an appointing authority and has not been offered employment. After an applicant has appeared on a certification for three (3) consecutive times for the same classification no matter what the disposition, that applicants name will be dropped from the certification. The applicant will have to submit a new application to the agency in order to be qualified to appear on another certification for that same classification.

A probationary appointment cannot be made unless you enter a disposition code beside each name certified to the register.

Applications from a certification will remain on file for one (1) year unless a disqualification occurs. At the end of that year or upon disqualification, the application and material will be destroyed.

Remember - the certification you request for a certain classification is only good for **sixty (60) days**. You can reuse this register for one (1) entire year or until you readvertise for the position. If you want to request the same register within that year, you need to request the MCIH 30 screen with the position number and the same beginning and ending advertisement dates, then contact the Frankfort office to certify the register for you. **Place a copy of each application and a copy of the MCIH screen in a folder with a copy of the original advertisement. This will assure that you have the dates and information you need to request a register within a year from the original advertisement date.**

The day after you have entered the disposition on your register, call out REPORT 890. The report will provide you with documentation of the appointed employee. It should be placed in that employee's personnel file.

## **CDS555 - ALL PERSONNEL ACTIONS ARE ENTERED USING THIS SCREEN.**

**First Line -** Always use N for new. The client is always 30.

**Field #1-6 -** Demographics, **Field #3** is the county in which they reside.

**Field #8 -** Nature of Action. This is the code that relates to the type of action you need to enter for the employee. For example: An appointment – type the number 1 there. Do not type in the word appointment.

**PERSONNEL ACTIONS SHOULD BE EFFECTIVE AT THE BEGINNING OF A PAYROLL PERIOD.** You must receive approval from the Frankfort office if there is a special circumstance that would require an individual to start in the middle of a payroll

period.

### **III. APPOINTMENT OF AN INDIVIDUAL FOLLOWING RECRUITMENT (Action 1)**

Once a health department has offered an appointment to the applicant and the applicant has accepted, the next step is to place the individual as an employee.

**DO NOT ENTER APPOINTMENTS UNTIL THE DAY THE EMPLOYEE STARTS TO WORK.** When entering an appointment on CDS555, all information must be complete and accurate. Once you have established an employee into the personnel system, any future actions for this employee only need to be done by using their social security number. You do not need to enter name and address again unless it is a name change or address change.

### **YOU MUST SUBMIT A JOB DESCRIPTION TO FRANKFORT FOR AN APPOINTMENT ACTION**

**A P65 is a job description of the position. It is required for appointments, promotions, reclassifications and “tweeners”. A P65 should be received in Frankfort no later than one month after the employee’s original appointment date.** A reminder will be emailed to the agency once a month informing them of the P-65’s that are needed in the Frankfort office.

Please do not enter appointments early. If you enter an appointment action early and the person does not show up to work, you have created an invalid appointment and the only way this appointment can be terminated is by using action 7, which is a resignation. Therefore you have created an employee file unnecessarily.

Regular probationary appointment actions become a hard copy the next day in the form of Report 861. Make sure your data entered is correct. Once it polls over night, it can only be corrected by using action 31 (corrective action).

If you queue your printer to 12, this will create a paper trail for all actions entered on CDS555, giving you the information you have entered in on the employee.

### **TO BRING BACK A PERSONNEL ACTION YOU HAVE ENTERED:**

Type **MRIS** (sp) 30 (sp) health dept. # (sp) SS # of employee. If you have entered a personnel action and you realized that you have made a mistake the same day and you have lost the screen with the personnel action on it, type this command and it will come back to you. The “action” at the top of the screen will change from “N” to “C” and the system will allow necessary changes to be made. You should receive a return message at the bottom of the page as p-2 completed. If you are unable to get it back, call personnel. **THIS CAN ONLY BE CHANGED THE SAME DAY**, once it polls over

night it cannot be corrected by the agency. Once it polls overnight and is on the report 817 you must contact your assigned personnel staff member in Frankfort. A helpful hint is to queue your printer to 12 before entering personnel actions and it will give you a paper trail of what actions you have done for the day. If you want a complete copy of what you have done, you can hit your reverse form key and copy your page.

Once your action polls overnight that does not require Personnel approval and a report 861 is generated, any errors discovered will have to be reported to your appropriate personnel staff member in Frankfort and may require a corrective action. If your action generates a report 817 (pending list), you can contact personnel the next day. Most errors can be corrected before they are approved off the pending screen.

Remarks on an appointment: Use this space to make any special remarks about the action. If the person being appointed has had previous health department service and a leave balance, you could indicate this in remarks (any previous service needs to be verified through Frankfort). ***Service time with state agencies, Fayette County Health Department, Jefferson County Health Department and Northern Kentucky District Health Department is NOT recognized.*** If this applicant is being hired at a higher entrance salary due to additional experience, indicate this in remarks. The higher entrance salary must be approved by Frankfort prior to the date of hire.

**The remark line on the CDS555 screen is for remarks only. It will not change any main information on the employee like annual date, salaries, etc.**

#### **Field 9 - EMPLOYEE CLASS ID**

#### **A NOTE TO REMEMBER ON ID NUMBERS**

You must enter the first two digits of the ID number that corresponds with the classification. Refer to the information on ID's or type **MR**IK (sp) 30 (sp) and classification code, and transmit. You enter the first two (2) digits and once you have completed all the information on CDS555 for action 1, transmit. The ID number will appear at bottom of the page.

**If you do a personnel action that requires the changing of the four-digit classification and it does not require an ID number change, you MUST ENTER THE COMPLETE ID NUMBER ALREADY ASSIGNED; otherwise the system will assign a new one.**

An ID number will be assigned, but it will not be activated until the necessary paperwork has been received in Frankfort and the action is approved off to report 861.

If it is an appointment that generated a Report 817, the ID number will not be active until Report 861 is generated. This ID number will remain with that employee for the

remainder of their service with the merit system unless it is changed via reclassification, promotions, etc. If this appointment is requesting a higher entrance salary, it will remain on report 817 until a justification letter for a higher salary is submitted to Frankfort.

**Field #11 - Position Number:** Enter the four-digit computer code and position number that you obtained before requesting the register in these two blocks from the MRIO screen. Field #11 – Second line is salary.

### **SALARY**

**DO NOT ENTER A SALARY**, The computer is programmed to enter this automatically on your report 861. The only time you enter the salary is when the applicant is coming in at a higher salary due to extra experience.

If you are requesting a higher entrance salary due to experience you **MUST** enter the desired salary. This salary **MUST** be discussed with Frankfort. This personnel action is generated to report 817. It will be approved off to report 861 when supporting documentation is submitted - a letter of justification for the higher salary is required to be sent to the personnel office from the appointing authority

**Field #12 - Above Minimum:** If the Health Department has an established above minimum for this classification, you must enter the letter "y" in the block at the end of the line. If not, leave blank. You can find out if your health department has an established above minimum by typing,

**MRIH (sp) 30 (sp) HEALTH DEPT. # AND TRANSMIT**

**Field # 7 – Increment Date:** The system automatically assigns the increment date. **DO NOT ENTER ANNUAL OR PROBATIONARY INCREMENT DATES.**

**Field #13 –** (bottom left first FLSA exempt – Refer to your reference material for determining the exempt status of your employee. Enter the letter “Y” or “N”.

**Field #16 - EDUCATION** (optional information) – If you have this information, please enter it on the system. Entered as 12-HS, 13-1 year, Associate -14 and Bachelor-16.

**Field #17 - DATE OF BIRTH – PLEASE ENTER-** you must obtain this information from the employee; it is no longer included on the application.

**Field #18 - SEX:** Enter the letter "F" for female or "M" for male.

**Field #19 - RACIAL ORIGIN:** Enter the letter "W" for white or "N" for non-white

**Field #20 - MARITAL STATUS:** Enter one of the following codes;

M - Married  
D - Divorced  
W - Widow  
S - Single

This information is obtained from the employee - not on the application

Now you are ready to transmit - **BE SURE TO CHECK YOUR INFORMATION FOR ACCURACY.** After you transmit, the ID number assigned to this employee will appear at the bottom of the screen.

If the social security number on the register is different than the application, you must enter on CDS 555 the one on the certification. Even though it is wrong. When you have received the report 861 for your employee, call Frankfort and it will be corrected. Then you can run another report 861 for your files.

The system will require a type of appointment as well as the status of the appointment.

**Types of Appointments:**

**PROVISIONAL APPOINTMENT** must be certified on a register and once that position has been advertised for as a permanent position and that employee is placed on a cert they can be made into a probationary appointment by using Action 24. Otherwise the employee will be terminated in thirteen (13) pay periods. **IF YOU HAVE AN EXISTING REGISTER, A PROVISIONAL APPOINTMENT CANNOT BE MADE.** You should always check with Frankfort. If this appointment is designated full time or part-time 100, they will accrue annual and sick leave. May count time toward probation if later selected from a register.

Based on Administrative Regulation 902 KAR 8:080, the following is a list of other types of appointments.

**EMERGENCY APPOINTMENT** cannot exceed seven (7) payroll periods and will automatically terminate. If the employee leaves before the time period, you would enter a resignation action. Please submit an application, job description, and a letter of justification to the Frankfort office. **NO LEAVE TIME IS EARNED.** No other benefits are received. If this appointment is a full time appointment, they would be eligible for holidays. Regulation 902 KAR 8:080, Section 4.

**SEASONAL APPOINTMENT** is for (19) nineteen payroll periods and will terminate automatically. If the employee leaves before the time period, you would then enter a resignation action. Please submit an application, job description, and a letter of

justification to the Frankfort office. EARNs SICK TIME. No other benefits are received. If this position is a full time position, they would be eligible for holidays. Regulation 902 KAR 8:080, Section 6.

**TEMPORARY APPOINTMENT** is for (13) thirteen payroll periods and will terminate automatically. This appointment is made from a register. ***Enter action code TA for this appointment in payroll.*** If the employee leaves before the time period, you would then use a resignation action. Please submit a P-65. Full time and Part time 100 employees earn sick time. 902 KAR 080, Section 5.

**VARIABLE HOUR APPOINTMENT** cannot exceed 400 hours per year and shall not be considered in the classified service. An agency because of special working requirements in meeting programmatic service needs, may establish a position having variable hours of work. This employee is not eligible for salary adjustments. No benefits earned. 902 KAR 8:080, Section 7.

**PARTIAL YEAR APPOINTMENT** is not to exceed seven (7) pay periods that they are not at work per year. This status has been established to accommodate foreseeable fluctuations in staffing, budgetary, operational, programmatic or other needs. This employee shall serve a probationary term and be provided health insurance. This employee does receive sick time for the dates they are in work status. For further information, see 902 KAR 8:080, Section 8.

The above appointments are not renewable, and only the provisional appointment is credited toward the probationary period if the employee becomes permanent. Follow the procedures of an initial appointment. These actions are terminated automatically with action 25. They will appear on report 817 before termination to remind you that it will be happening. When entering this action on the CDS555 screen, place a "Y" in the Partial Year section on that screen.

If you plan to make one of these appointments permanent, the person must be certified to a register. Before the appointment is made they must be resigned from the seasonal, emergency, temporary or variable hour position, and then be appointed as an initial appointment.

**Field #13 - EMPLOYEE STATUS** – you must mark which type of appointment it is. These appointments are time limited and will appear on report 817 the next day. They will remain on report 817 until documentation is submitted along with an application and P-65 and a letter of justification for these appointments.

If you are appointing an employee as a part-time person, be sure to mark (X) for part-time and enter the approximate number of hours in the box.

If the person is to be part-time 100 hours, you must mark this item.

If the employee is designated an irregular hours employee, place an X beside the irregular block.

If the employee is a partial year employee place Y and also a status such as PT, PT100 or FT with X.

On initial appointments, you must enter a (X) beside probationary. Remember - appointments should ALWAYS be made on a beginning payroll day. A NEW EMPLOYEE SHOULD NOT BEGIN BETWEEN PAYROLL DATES.

**If a payroll date begins on a holiday and it is the first day of employment for a new full time employee, this employee is entitled to holiday pay.**

## **REINSTATEMENT - ACTION 2**

Before you make a commitment to reinstate a former employee, you should make sure the person has reinstatement rights and they qualify for the position. An employee who left in good standing, that is they had completed their initial probationary period, has reinstatement rights up to three (3) years if they meet the current qualifications.

It is very important that you submit an updated application with the position description along with a letter requesting reinstatement to make sure that the applicant qualifies for the position. No register is required at this time. Our specification on classes changes from time to time. There have been instances where an active employee was grandfathered into the new specification, but once an employee resigns and wants to be reinstated, this grandfather clause does not apply. Therefore they must meet the current specification for the classification they wish to be reinstated into.

A permanent employee who resigned in good standing is eligible for reinstatement to the same position or a corresponding position. The employee has seniority rights and picks up sick leave if a balance was left on the books. The salary is negotiable. The total number of years worked before resigning is recognized toward earning leave balances.

A former employee who was in probationary status prior to termination does not have reinstatement rights.

A probationary period is required if separated more than twelve (12) months, and this is the same as an initial probationary period for a new employee. They will receive a probationary increment. If an employee returns after one year and is placed on probation, their sick leave that was left on the books is not reinstated until they have completed their six-month probationary period. The annual increment is twenty-six (26) pay periods from the time of reinstatement. Do not enter the increment date the system

will assign the increment date on report 861.

In the remarks on CDS 555, enter the leave balance if known and the years of service. This will aid payroll.

When completing the CDS 555, complete the name, address, and effective date. YOU MUST COMPLETE THE SALARY ON THIS PERSONNEL ACTION. Leave the increment date blank. Item 13 Employee Status must be entered as permanent, then full-time, part-time, or part-time 100 hours. Item 9 Employee Class ID: Enter the first two digits that correspond with the classification. Due to the change in the ID program, the employee cannot use the old number. The number will be given at the bottom of CDS555. Upon approval of a new number please be sure payroll and Help Desk deactivate the old number and the new number is used from this time forward.

It will not be activated until report 861 is created. Reinstatement actions are generated to Report 817 until all documentation is received. The documentation needed at Frankfort is a letter with an updated application and an up dated P-65.

**Field #11** - Classification and Position number – before completing this field you should obtain a position number.

#### **TRANSFER IN - ACTION 4**

Action 4 is used when you have an employee transferring from one agency to another within the merit system.

When entering information on this transfer to your agency, all information must be entered. The system does not automatically pull the information from one health department to another one. This is for confidential reasons.

You must enter the name and address and THE INCREMENT DATE. IT WILL NOT PICK IT UP. You also MUST ENTER THE SALARY. If you do not enter the salary, the system will assign the entry level for the classification.

In remarks: Enter the county they are transferring from in the **Trans County** block. Enter the sick and annual leave balances. Comp balances CANNOT be transferred. The health department they are transferring from must pay the comp time balance. If you have enough room, the service time should be entered in the remarks.

**An employee can only be transferred at the same salary and same classification.** The only time a salary increase would occur is when the health department has an above minimum established for that classification and the employee is below it.

A position number must be obtained. If you plan for the ID number to remain the same,



you must enter the whole ID number.

You need to obtain an updated application and P-65. Mail these two documents to Frankfort along with letters from both health departments accepting the transfer. Transfers are only done at the beginning of payrolls. Action 3 is generated to Report 817 and remains there until all documentation is received in Frankfort.

It is recommended that a letter from each health department be submitted. One letter from the health department releasing the employee (with leave balances), and the other letter accepting the transfer, including leave balances. It is the responsibility of the transferring agency to see that Frankfort receives both copies of these letters.

## **RE-EMPLOYMENT - ACTION 22**

Re-employment is a personnel action used when an employee has been laid off and is re-employed within one (1) year.

An updated application and P-65 are needed. The employee is certified to a re-employment register.

This action is created on report 817 until proper paperwork is received in Frankfort.

All fields should be completed for this action. An annual increment date will be assigned by the system.

The employee must contact the Frankfort office requesting that they be placed on the re-employment registers for which they qualify.

## **APPOINTMENT FROM PROVISIONAL - ACTION 24**

If you have an employee who has been appointed as a provisional employee, the employee's status will be changed to a probationary appointment if you plan to keep the employee.

The position is advertised and the steps that are used to make an initial appointment are followed. Once this person has been certified to a register, a register must be requested. The disposition must be entered on the certification. Once this has been done, action 24 is ready to be completed. Action 24 cannot be completed and certified until the advertisement is completed and all applications have been processed. All the steps mentioned must be completed before the expiration of the provisional appointment. Once the provisional appointment has expired, an appointment from provisional action can no longer be approved.

**DO NOT ENTER A RESIGNATION ON THIS EMPLOYEE.**

Once the action is completed it generates report 817. It remains on report 817 until it is approved off.

The time that an employee serves in the provisional status immediately prior to the appointment may be credited toward the probationary period for the employee.

The only time a provisional appointment can be permitted is when there is not a current register available for the classification that you want to fill. Refer to 902 KAR 8:080, Section 2

#### **TRANSFER WITHIN AGENCY – ACTION 40**

*This action is to be used when an employee transfers from one county to another county in your agency or transfers from the home health to clinic or vice versa. This applies to the district health departments and health departments that have clinic and home health services.*

*The fields to be completed are #7 (Effective date requested), #8 (nature of action) and remarks.*

#### **IV. PERFORMANCE EVALUATION - ANNUAL INCREMENT DATE AND PROBATIONARY INCREMENT - ACTION 19 & 20**

These two actions are not entered in the system by the health departments. They are generated automatically on report 817. The health department would enter an annual increment if an employee was reinstated and the system did not pick up the annual increment date.

Before report 817 is generated, Reports 833 and 834 are created for the health department after the first Tuesday of the month to tell them one month in advance what increments are due.

If you have an employee that is due an increment and they do not appear on your 817, please let Frankfort know and one will be generated.

Report 817 is generated the Tuesday before the effective date of the increments.

***Each fiscal year the health departments must inform the Frankfort office of the annual increment percentage so the percent can be programmed. Please try to do this before the new fiscal year begins. If the Frankfort office does not hear from you, the annual increments will stay on the pending list until we know the annual increment percentage. As of January, 2006, each year the health departments must now notify the Frankfort office which evaluation they are going to use***

*between CH40 (080 plan) or CH40A (096 plan). Your MRIH screen will identify what form of evaluation your agency uses.*

**If your agency is using evaluation regulation 080, and an evaluation increment is to be denied, you must notify the Frankfort office no later than fourteen (14) days in advance of the annual increment date.**

### **EXTENSION OF PROBATIONARY PERIOD - ACTION 13**

THIS ACTION MUST BE ENTERED BEFORE THE PROBATIONARY INCREMENT APPEARS ON REPORT 817.

There are only two reasons for extending the probationary period.

- (1) If an employee has missed work due to medical reasons during probation for more than twenty (20) days; This must have proper documentation.
- (2) The employee has been unable to complete the required job related training course.

Refer to 902 KAR 8:080, Section 10 (7).

If the probationary period is to be extended, the following must be done:

- (1) A letter of request for the extension must be sent to Frankfort for approval at least seven (7) days prior to the due date.

Action 13 generates Report 817 until approval.

You must enter a short explanation in remarks and the number of weeks it will be extended. The probationary date cannot be extended over twenty-six (26) pay periods. Since the system does not know the number of weeks you are extending the period for, you must enter the date. IT MUST BE A BEGINNING PAYROLL DATE.

If you have an instance where this will happen, refer to your Report 833 that is generated the first week of the month after Tuesday. If this person appears and you know it will be extended, enter your action then.

The fields that are to be completed are # 7 effective date requested, the new probationary date, # 8 nature of action, and remarks.

### **ANNUAL INCREMENT – ACTION 19**

This action is automatically done by the CDP system. If it is not, please contact the Frankfort office.

## **PROBATIONARY INCREMENT – ACTION 20**

This action is automatically done by the CDP system. If it is not, please contact the Frankfort office.

## **PERFORMANCE EVALUATION – ACTION 46**

This action is used with Regulation 902 KAR 8:096. A supervisor shall develop an annual, written performance plan for each employee supervised. This evaluation is used by the supervisor to evaluate an employee's job performance. There are five rating factors. These factors are as follows:

- (5) Highly Commendable Performance
- (4) Proficient and Commendable Performance
- (3) Effective and Competent Performance
- (2) Needs Development Performance
- (1) Unacceptable Performance

If an employee receives a rating of (5) or (4), the employee will receive their annual increment adopted by the Board and an additional lump sum payment not to exceed 3% of the employee's salary.

If an employee receives a rating of (3) the employee shall receive the annual employee performance rate adopted by the Board of Health at the beginning of the fiscal year not to exceed 5% of the employee's salary.

If an employee receives a rating of (2) the employee shall be entitled to receive a salary adjustment equivalent to 50% of the annual performance evaluation adopted by the Board of Health at the beginning of the fiscal year. This employee shall be re-evaluated in 120 days following the annual evaluation to determine if the employee's performance has improved.

If an employee receives a rating of (1) the employee shall not receive a salary increase and disciplinary action should be taken. This employee shall be re-evaluated in 120 days unless they were dismissed.

The fields to be completed for this action are #7 Effective Date Requested (this would always be their annual date), Remarks, #8 Nature of Action and Evaluation score. The salary is automatically generated by the system after you place the score in the evaluation score box.

Currently the system asks for class on field #11, be sure not to change the existing classification number.

## **RE-EVALUATION INCREMENT – ACTION 47**

This action is used with Regulation 902 KAR 8:096. If an employee receives a rating score of (1) or (2) that employee shall be re-evaluated 120 days after their initial evaluation. The appointing authority shall provide the employee a salary adjustment at the needs development level if the employee improves their level of performance and satisfactorily meets the performance improvement objectives as determined by the re-evaluation. The fields to be completed for this action are #7 effective date (date of re-evaluation) Remarks, #8 Nature of Action and the Evaluation Score.

The salary is automatically generated by the system after you place the score in the evaluation score section.

If after the re-evaluation the employee improves and gets the other half of their annual- you would place a (6) in the evaluation score. If the employee does not improve at all, you would place a (7) in the evaluation score and the employee would not receive an additional salary adjustment and the prior adjustment would be removed.

## **V. CHANGES IN SALARY**

### **PROMOTION - ACTION 3**

Promotions are entered as action 3. Refer to your ID list to determine if an ID change is needed. If there is, you enter the first two digits of the new ID number. If it is to stay the same, enter the complete employee ID number.

Promotions are generated to Report 817; therefore, your new ID number will not activate until it is approved off. You must obtain a position number. Refer to your directions for obtaining a position number.

A salary increase resulting for a promotion is the higher of the following: (a) five percent (5%), (b) three percent (3%) per grade or (c) the minimum of the new grade.

***A PROMOTION WILL NOT CHANGE THE INCREMENT DATE.*** An employee who is promoted serves a six (6) month probationary period. At the end of this time, a three percent (3%) increase in salary will be awarded if the probationary period is completed successfully which is determined by the completion of an employee performance appraisal. The system will tell you when this period will end.

If the agency decides that the employee has not completed the six (6) months successfully, which is determined by employee performance appraisal form (CH-40), the employee will be reverted back to the class previously held. **THIS MUST BE DONE TWO (2) WEEKS PRIOR TO END OF PROBATIONARY PERIOD.** If no vacancy

exists, the employee may be reverted to a position they qualify for by the department. Refer to 902 KAR 8:090. A reversion back to the employee's prior classification must be processed as a demotion action on the CDS555 screen.

When you enter a promotion on CDS 555, be sure to enter an "X" beside probationary in Item # 13, Employee status. Promotions are made effective on the beginning of a payroll period.

The fields to be completed for action 3 are: the effective date (#7), nature of action (#8), ID number (#9), in the remarks please note being promoted from - to, Position No. Code: Classification:, an 'X' by probationary in employee status (#13).

If an employee does not meet the qualifications for the promotion, a denial code will be entered on this personnel action. Report 861 will be generated to reflect this denial and the reason for the denial will be noted on the personnel action.

## **DEMOTION - ACTION 5**

Our administrative regulations provide for three (3) types of demotion: (1) agency initiated (2) voluntary and (3) Reorganization.

A letter of justification for the demotion along with a p-65 must be submitted to Frankfort.

You must obtain a position for the demotion. Refer to ID information to see if an ID change is necessary. If not, enter the complete prior ID number.

**YOU MUST ENTER THE SALARY. THE SYSTEM IS NOT PROGRAMMED TO KNOW HOW MUCH TO DECREASE THE SALARY TO.**

If this is a voluntary demotion from the employee, you must submit the letter from the employee accepting the demotion and a P-65.

Action 5 generates Report 817 and remains there until the proper paperwork is submitted to Frankfort for approval. The effective date is the beginning of a payroll date.

The salary shall be reduced by five percent (5%) for all employees. If an employee is being demoted from supervisory duties, an additional three percent (3%) reduction shall be taken from the employee's salary. If this demotion is being generated due to a disciplinary action, ten percent (10%) shall be taken from the employee's salary. See 902 KAR 8:090, Section 3 (4) regarding disciplinary demotions.

## **SALARY ADJUSTMENTS - ACTION 12**

Use this action when there is an adjustment to be made to salary that is not covered by the established personnel action. See examples below.

A letter of justification for this salary increase or decrease must be submitted to Frankfort.

When entering the action, the fields that must be completed are # 7, effective date (must be beginning payroll), # 8 nature of action, remarks: enter a short explanation as to why the salary is being adjusted, and # 11 Salary. YOU MUST ENTER THE SALARY, the system does not know what the salary is. This action is generated to report 817 and remains there until letter of justification is received in Frankfort.

Examples of salary adjustments are as follows:

The Health Department raises the above minimum for a certain classification. If they have employees who are below this established salary, these employees must be brought to the new minimum.

When a health department receives special permission to do an across the board raise.

If a new employee is appointed at a higher entrance salary due to experience and there are current employees who have the same amount of experience and are below this entrance salary, the employees must be raised to the salary.

If a grade change to a classification occurs and you have employees who are making below the new assigned grade, these employees must be adjusted to a new salary once a new employee is appointed at that salary.

## **RECLASSIFICATION ACTION WITHOUT PROBATION – ACTION 23**

Before entering the reclassification, a position number must be established if there is not a vacant one. Refer to the directions for establishing a position number.

Refer to the information on ID numbers to see if you need a new ID number. Enter the first two digits of the new number and if you keep the old one, enter the entire previous class ID number.

A reclassification occurs when additional job duties are added to a position. A salary increase for this action is the higher of the following: (a) five percent (5%), (b) three percent (3%) per grade or (c) the minimum of the new grade.

The fields to be completed are # 7 effective date requested (beginning payroll date); # 8 nature of action, # 9 employee class ID, remarks: Type being reclassified from \_\_\_\_\_ to \_\_\_\_\_, # 11 position number code: classification and number.

Do not enter the salary. The system is programmed to assign the higher salary. This action generates a report 817. The action will remain on report 817 until a letter requesting the reclassification, along with an updated application and P-65, is submitted to Frankfort for qualification. This action is effective at the beginning of a payroll date.

### **LUMP SUM MERIT PAYMENT - ACTION 33**

There are only four (4) fields that need to be completed for this action: # 7 Effective Date Requested, # 8 Nature of Action, and Remarks:

In the remarks you type in the percentage for the lump sum payment of \$\_\_\_\_\_.

This action creates Report 817. It remains on report 817 until a letter of justification is mailed to Frankfort. Must explain in detail what outstanding accomplishments the employee has accomplished that merit recognition for a lump sum payment in the letter.

#### **The formula for figuring merit payments is as follows:**

Take the current compensation plan grade minimum of the classification salary that the employee is assigned to and multiply by 1950 hours, multiply that total by the percentage. This will give you the lump sum payment to be awarded. ***For a part-time 100 hour employees, use 1200 hours. If there is going to be an extra pay period in the year, it would be multiplied by 2025 hours.***

An employee cannot exceed eight (8) percent during the annual evaluation period of twenty-six (26) pay periods. If a lump sum payment is going to exceed \$2,000 per payment then the health department shall inform the Board of Health of the number of payments that exceed that amount that was granted during that fiscal year.

This action is effective at the beginning of a payroll date.

### **IN RANGE ADJUSTMENT - ACTION 34**

***This action is known as the tweener. If you have an employee who has been given permanent additional duties, but not enough to qualify for a reclassification or a promotion, the health department can reward the employee for these additional duties with an in-range adjustment from one (1) to five (5) percent. MUST NOT exceed five percent.***



This action will remain on report 817 until justification is submitted to Frankfort telling what additional duties have been added. Along with this letter an addendum to the P-65 is required.

There are three fields to be completed: # 7 effective date requested (beginning of a payroll), # 8 nature of action, #12 step entered as percentage amount and Remarks. Should enter a short explanation of the increased workload. Refer to 902 KAR 8:060 Section 5.

#### **EDUCATIONAL ACHIEVEMENT AWARD – Action 44**

An appointing authority may grant a five (5) percent increase to an employee's base salary based on educational achievement. An employee shall not receive more than one educational achievement award in a fiscal year. Refer to 902 KAR 8:060, Section 12.

A letter with a copy of the educational achievement should be sent to Frankfort. This action will remain on the 817 report until Frankfort receives the correct paperwork.

May be on leave without pay (not agency funded) and still be eligible for the award.

#### **SUPERVISORY DEMOTION – ACTION 48**

This action is used when an employee who currently holds a supervisory position and no longer wants the supervisory responsibilities. This action can also be used if the appointing authority feels the employee is not performing their supervisory duties in the manner that they need to be performed or due to reorganization. The employee's salary shall be reduced by 5%. If the employee is demoting to a position that no longer requires supervisory responsibilities, the employee's salary shall be reduced by an additional 3%.

If the demotion is due to reorganization, the employee may retain the salary received prior to the demotion.

The fields to be completed are #7 Effective Date requested, #8 nature of action, #9 Employee Class ID, Remarks, #11 classification and position numbers and the salary.

#### **RECLASSIFICATION ACTION WITH PROBATION – ACTION 52**

Before entering this action, a position number must be established if there is not a vacant one. Refer to the directions for establishing a position number.

Refer to the information on ID numbers to see if you need a new ID number. Enter the first two digits of the new number and if you keep the old number, enter the entire

previous class ID number.

A reclassification occurs when additional job duties are added to a position. A salary increase for this action is the higher of the following: (a) five percent (5%) for one (1) to two (2) grades or (b) three percent (3%) per grade or (c) the minimum of the new grade. This reclassification action would be used in the following examples: A Family Support worker is being reclassified to a Senior Support Services Associate. A reclassification to a supervisor level position or to a position in the same grade but different classification series requires a probationary period.

**This reclassification with probationary period will not change the annual increment date.** This employee will serve a six month probationary period. At the end of this time, a three percent (3%) increase in salary will be awarded if the probationary period is completed successfully which is determined by the completion of an employee performance appraisal. The system will tell you when this period will end.

If the agency decides that the employee has not completed the six (6) months successfully, which is determined by the employee performance appraisal form, the employee will be reverted back to the class previously held. This must be done two (2) weeks prior to the end of the probationary period.

The fields to be completed are the same as a regular reclassification however you do need to place a "X" in the probationary section.

Do not enter the salary. The system is programmed to assign the higher salary. This action generates a report 817. The action will remain on report 817 until a letter requesting the reclassification, along with an updated application and P65 is submitted to Frankfort for qualifications.

## **VI. DISCIPLINARY ACTIONS**

### **SUSPENSION - ACTION 6**

Must have "intent" before the final suspension can be pursued. Templates are available by contacting LHP.

Suspension action generates report 817. This remains on the report until a letter of justification is submitted to Frankfort.

The only fields on this action to be completed are the effective date, nature of action and the remarks section.

In remarks, enter the number of days the employee will be suspended for. Enter whatever information you feel is pertinent. You do not have to do a return from

suspension action. Place in remarks "suspension from \_\_\_\_\_ to \_\_\_\_\_ for a total of \_\_\_\_\_ days".

It is an official personnel record for your files for disciplinary action.

Before the Frankfort office can approve this action off the pending screen, you must submit a copy of the suspension letter to the Personnel Office.

Refer to 902 KAR 8:100, Section 2.

## **VII. EMPLOYEE SEPARATIONS**

### **RESIGNATION - ACTION 7**

PLEASE DO NOT ENTER RESIGNATIONS EARLY. ENTER THE DAY AFTER THE PERSON LEAVES. Action 7 automatically generates a report 861. Once this action has been done the employee is removed from the active files. An example of entering an early resignation: the health department had an employee on probation who turned in her resignation two weeks in advance. A couple of days before the employee was to leave, the situation changed in the office and the employee decides not to leave. Because you cannot rescind a resignation, this employee had to be appointed again and serve another probationary period.

The only fields to be completed for this action are the effective date, nature of action and remarks section.

In the remarks, enter lump sum payments for comp time and vacation time. Enter the sick leave balance. By entering this information in your remarks section, if the employee is ever rehired this information will be useful to you.

If an employee does not give a two (2) week notice, the appointing authority does not have to pay lump sum payments.

Whenever possible, you should obtain a letter of resignation from the employee. It **is not** a requirement to send a copy of the employee's resignation letter to the Personnel Office.

### **DISMISSAL - ACTION 8**

Must have "intent" to dismiss before completing dismissal action.

The only fields to be completed for this action are # 8 nature of Action, # 7 Effective Date Requested and remarks section.

In the remarks section you should enter a short explanation.

You should enter any lump sum payments, if there are any, or sick leave balances.

This action generates Report 817. It will remain on this report until a copy of the letter of dismissal that was sent to the employee is submitted to Frankfort.

## **LAYOFF - ACTION 9**

Prior to placing layoff actions on the CDS555 screen your agency must have submitted a layoff/reorganization plan to LHP and must have received a letter from that office approving the request. The employee must be given a fifteen (15) day advance notice after approval from Frankfort before changes become effective.

The fields to be completed are # 7, effective date requested, # 8 nature of action, and remarks.

In remarks you should enter a short explanation, lump sum payments and leave balances.

This action generates report 817, and will remain on the report until a letter from the health department describing the layoff plan is submitted and approved.

## **RETIREMENT - ACTION 10**

Only fields to be completed are # 7, effective date requested, # 8 nature of action, and remarks.

Enter the leave balances and lump sum payments in remarks.

The employee should submit a letter of retirement to the health department. The Personnel Office **does not** require that a copy of this letter be sent to Frankfort.

This action generates a Report 861 automatically.

Retirees considering employment after retirement in the KRS at the LHD must have the following considerations applied.

- (1) No retiree should be reinstated to the health department.
- (2) All retirees considered to return to employment at the LHD should be treated as an original appointment from an appropriate register and at the minimum salary range of the class/grade. An agency can request a salary adjustment based on the individual's experience pursuant to 902 KAR 8:060, section (2) paragraph (6).

- (3) Employee should contact Retirement about how it will affect their retirement status.
- (4) All earning of leave balances and service credits will start at a 0 balance.
- (5) Health Insurance will be applied per guidelines of the Kentucky Employee Health Plan and rules of the Kentucky Retirement System.

Termination date should be the last date actually worked, or the last day of leave with pay or without pay.

#### **DEATH - ACTION 11 - Leave Balance in remarks**

#### **EXPIRATION OF TIME LIMITED APPOINTMENT - ACTION 25**

This action is generated automatically by the system to Report 817. This is for the appointments that are only made for a certain number of pay periods. It will appear on Report 817 a couple of weeks before the effective date, which is at the end of a payroll period.

A letter from the health department must be submitted to Frankfort stating the employees name and why the department is placing them in an Expiration of Time Limited appointment.

#### **TRANSFER OUT - ACTION 32**

This action is completed when an employee is leaving your agency to go to another. The fields to be completed are # 7 effective date requested - ON THIS EFFECTIVE DATE YOU MUST USE THE LAST DATE OF THE PAYROLL PERIOD, # 8 nature of action, and remarks.

If the agency wants the employee to keep the same ID number, the transfer out will need to be completed before the transfer in. If the agency would like the employee to have a different ID number, the transfer in will need to be entered before the transfer out.

#### **VOLUNTARY FURLOUGH – ACTION 49**

An agency may implement a voluntary furlough program as part of a layoff/reorganization plan established in Regulation 902 KAR 8:080, Section 13. This leave shall be considered a temporary non-disciplinary leave without pay for a stated specific period of time. A furlough may be for periods up to twenty-two (22) working days per fiscal year.

The employee who is interested in being placed in a voluntary furlough status shall request prior approval from the appointing authority. The request shall include the reason for and the manner in which the employee proposes to use the furlough period.

The only fields in this action to be completed are the effective date, nature of action and the remarks section.

In remarks enter the dates the employee will be on furlough. Before the Frankfort office can approve this action off of the pending screen, you must submit a copy of the lay-off/reorganization plan to the Personnel Office. An employee on furlough is in non-pay status and not eligible to accrue annual or sick leave during the time they are off.

### **INVOLUNTARY FURLOUGH – ACTION 50**

An agency may implement a involuntary furlough program as part of a layoff/reorganization plan established in Regulation 902 KAR 8:080, Section 13. This leave shall be considered a temporary non-disciplinary leave without pay for a stated specific period of time. A furlough may be for periods up to twenty-two (22) working days per fiscal year.

An appointing authority may direct an employee to be placed in a furlough status in lieu of a lay-off status. The employee must be notified at least fifteen (15) calendar days prior to the beginning date of furlough.

The only fields in this action to be completed are the effective date, nature of action and the remarks section.

In remarks enter the dates the employee will be on furlough. Before the Frankfort office can approve this action off of the pending screen, you must submit a copy of the lay-off/reorganization plan to the Personnel Office.

## **VIII. LEAVE PROVISIONS**

### **LEAVE WITHOUT PAY - ACTION 14**

Before you enter this action, **all leave must be exhausted**. This action should not be used if leave is for an approved medical reason and should only be used for a non-medical reason. If an employee has a quarter of an hour left, you would not put the employee on leave without pay until the next day.

A letter of justification for leave should be submitted to Frankfort unless it is for Medical Reasons.

**Leave without pay changes the annual increment date.** The system is programmed to calculate the annual increment date for you when you return the employee to work.

The fields to be completed are # 7 effective date requested, # 8 nature of action and remarks: short explanation of leave and possible return date.

This action generates report 861

### **MATERNITY LEAVE - ACTION 15**

Do not enter maternity leave unless it is to be leave without pay as this action will advance the annual increment date.

Use all sick, annual and comp leave before placing on maternity leave.

Maternity leave may not exceed six (6) pay periods unless approval is given by appointing authority.

Refer to 902 8:120, Section 6.

This action generates report 861.

The fields to be completed are: # 7 effective date requested, # 8 nature of action and remarks. Enter expected time of return.

Must have a doctor's statement.

### **EDUCATIONAL LEAVE WITH PAY - ACTION 16**

The fields to be completed are # 7 effective date requested (should start on a beginning payroll date), and remarks. You should enter the expected time of return.

This action generates report 861.

Documentation for this leave should be on file in the personnel folder.

Be sure to enter return from leave when the leave has ended.

### **MILITARY LEAVE - ACTION 17**

Fields to be completed are # 7 effective date requested, # 8 nature of action and remarks stating expected time of return.

This action generates report 861

Military Leave is addressed in 902 KAR 8:120, Section 11.

AN EMPLOYEE WHO IS AN ACTIVE MEMBER OF THE MILITARY SHALL BE GIVEN 75 HOURS IN A FEDERAL YEAR (OCTOBER 1 TO SEPTEMBER 30) TO MEET THEIR OBLIGATION. A COPY OF THE ORDERS SHOULD BE REQUESTED by the agency and provided by the employee BEFORE GRANTING THE TIME OFF. The employee will not lose pay or time. Military leave does not move the annual increment date forward and the employee shall be eligible for all salary increases afforded to other employees as they occur while on approved leave.

A leave of absence not to exceed six (6) years for military active duty can be granted. The employee can request to be paid for leave balance or elect to keep them on the books until they return.

### **EDUCATIONAL LEAVE WITHOUT PAY - ACTION 28**

This action is self-explanatory. On CDS 555 you enter the effective date (beginning payroll date), # 8 nature of action, and explanation of the type of educational leave and expected time of return in remarks.

This generates a report 861.

Make sure that you have the educational contract on file at the local health department level.

### **MEDICAL LEAVE – ACTION 29**

If an employee is eligible for FMLA this action will not be used until such time that FMLA (with or without pay) and Medical with pay has been exhausted. Employee may have up to ten (10) sick days remaining as time left on the books.

An employee entered on action 29 is considered leave without pay and will be required to bump their annual increment per 902 KAR 8:120 the total number of payroll periods not in required pay status hours. For example, if an employee is off 5 ½ days in a payroll period, their annual will be bumped up one (1) payroll period.

On CDS 555 enter #7 the effective date requested, #8 nature of action, and remarks like the expected date of return if known or short explanation.

Must have doctor's statement. The employee may be on medical leave up to twenty-six (26) payroll periods if approved by the appointing authority.

This action generates report 861



### **FMLA WITH PAY – ACTION 41**

*This action should only be used when the employee is eligible for FMLA and has specifically requested the agency to use their FMLA eligible hours in conjunction with using their accumulated time to remain in pay status.*

*Under FMLA “Eligible” employees are allowed job-protected leave, or to substitute appropriate paid leave if the employee has earned or accrued it, for up to a total of twelve (12) work weeks.*

*The agency is required to pursue any event known to be of a medical reason lasting longer than three (3) days that may be a potential FMLA event. Even if the employee does not expressly imply or request such leave, it is the agencies responsibility to send notice and rights under FMLA and request appropriate documentation of the event. When medical documentation is provided to the agency that is not sufficient or clear it is the agencies responsibility to request in a timely manner additional documentation however, the agency may not request additional medical documentation unless recertification requirements or second opinion requirements are met. If it is determined that the employee is eligible for FMLA the agency must ask the employee if they wish to exhaust accumulated time prior to going on FMLA leave.*

*In certain cases, an employee may choose to use their FMLA leave on an intermittent basis rather than all at once. This action may allow your employee to continue on FMLA with pay to utilize and earn their annual or sick time. If you have further questions regarding FMLA we suggest you refer to your FMLA guidelines or contact the Frankfort office.*

### **FMLA WITHOUT PAY – ACTION 42**

*This action should not be utilized unless the employee has exhausted all paid leave with the exception when workers comp is involved or when the employee has requested to reserve ten (10) days of sick leave balance.*

***If the employee has requested to use FMLA with pay prior to FMLA without pay, it is no longer necessary to do a return from FMLA action when changing from FMLA with pay to FMLA without pay.***

### **MEDICAL LEAVE – WITH PAY – ACTION 45**

*This action would be the first action used if an employee has reported a medical event, unless the employee requests to use paid time in conjunction with FMLA with pay or unless they do not have any leave time on the books.*

On CDS 555 enter #7 the effective date requested, #8 nature of action, and remarks like the expected date of return if known or short explanation.

Must have doctor's statement. This action is used if an employee is on leave with pay (sick, annual, etc.).

This action generates report 861

## **IX. RETURN FROM LEAVE ACTIONS**

### **RETURN FROM LEAVE - ACTION 27**

This action is used for all leaves but FMLA.

Effective date should be the actual day of return. The employee is to be returned at the status they left at. If a person went on leave as a full time employee, but wished to be part-time or part time 100 at the time of return, you must return them as a full time employee. Then you can enter an action to change their status. If a person was on probation at the time they left, you must enter an "X" beside probationary in Item # 13.

This action generates report 861. New increment date will be noted on 861.

When actions are processed as returned from leave the Annual increments must be manually advanced in the Annual Increment field.

You must complete the remarks section: enter a short explanation as to what type of leave they are returning from.

### **RETURN FROM FMLA – ACTION 43**

This action should be used after the maximum number of hours have been met per FMLA requirements or when the employee has been released to return to work. The fields that you would utilize for the above three actions will be Client, Action, District, Employee ID, Effective date, nature of Action and Remarks.

If an employee utilizes all of their twelve (12) weeks of FMLA, you would then have to enter a leave without pay action on the system. You only use this when they have used all twelve weeks of FMLA time. If you need further information on this, please contact the Frankfort office.

Upon the employee's return from FMLA, you will need to enter the new increment date into the system. If they were off from work for a total of four pay periods, their annual increment would be bumped up four pay periods.

**If you have any further questions regarding FMLA we suggest you refer to your FMLA Guidelines or contact the Frankfort office.**

## **RETURN FROM FURLOUGH – ACTION 51**

This action is used to return an employee from furlough. The only fields to be completed are the effective date, nature of action and remarks.

In remarks place how many days and the dates the employee was on furlough.

## **X. OTHER PERSONNEL ACTIONS OR CHANGES IN A POSITION OR EMPLOYEE STATUS**

### **NAME CHANGE - ACTION 18**

The fields to be completed are: # 1 name: enter the new name;  
# 2: new address if it changes, # 7 effective date requested (must be on a payroll date),  
# 8 nature of action and remarks:

**PLEASE ENTER THE FORMER NAME in the remarks section.**

This action generates report 861.

### **ADDRESS CHANGE - ACTION 21**

This action is to be effective on a payroll date. The fields to be completed are #6 the new address, #7 effective date requested, and # 8 nature of action.

This action generates Report 861 the next day.

### **OTHER - ACTION 26**

Action 26 (Other) is used for several kinds of personnel actions that require different fields to be completed.

This action will not allow you to change the salary or to change increment dates. This action generates Report 817.

Some of the actions "other" is used for are listed below:

Adding information: If you left off the birth date on the initial appointment and you need to add, use this action. The fields that can be added to are: #7 working county, #14 FLSA, #16 Education, #17 date of birth #18 Sex #19 Racial origin, and # 20marital status. Add the information you need and enter in remarks as to

what you are doing.

There may be other personnel actions depending on the circumstances at the time e.g., grade change for classification. If you have any questions as to what to use action 26 for, please call Frankfort.

### **ACTION 30 – MERITORIOUS INCREMENT**

This is an obsolete action.

### **CORRECTIVE ACTION - ACTION 31**

Corrective actions can be used to the correct information that is wrong. The fields to be completed are determined by what you need to change. **Remarks should always be completed.**

Most fields can be corrected. If you are correcting the salary, you must enter the salary. If you are correcting the classification and number, you must obtain a position number. Check the ID information to see if it needs to be changed; if so, enter the first two digits of the ID number.

On some corrective actions, documentation must be submitted to Frankfort depending on the personnel action as to what needs to be done.

If you are unsure of how to handle, please call Frankfort.

This action does create a Report 817. It will remain on the report 817 until the information has been verified.

Actions are made effective on beginning payroll dates.

### **DETAIL TO SPECIAL DUTY - ACTION 35**

If a health department has an employee who will be on extended sick leave or another kind of special leave, a health department can detail another employee to this position while the employee is on leave. There are other times when detailed to special duties can be applied, e.g., special duties for a temporary time.

Refer to 902 KAR 8:060 Section 11.

Detail to special duty gives the employee a five (5) percent increase in salary. It can be effective up to twenty-six (26) pay periods. The employee will be entitled to annual increment or any other salary increase while serving on detail to special duty. At the end of the term, the salary will be decreased by five (5) percent. This increase is only

allowed for the duration of the detail. **An employee cannot be promoted or reclassified** while assigned to detailed to special duty.

The health department must submit a letter of justification along with a P-65 reflecting the duties that the employee will be assigned.

This action is generated to report 817 and will remain there until proper documentation is received.

IF THIS DETAIL TO SPECIAL DUTY IS SHORTER THAN THE TWENTY-SIX (26) PAY PERIODS, THE HEALTH DEPARTMENT MUST ENTER THE ACTION TO TAKE THEM OFF. Otherwise the system will automatically generate a report 817 informing the health department of the termination.

The only fields that are to be completed are #7 effective date requested (beginning payroll), #8 nature of action and remarks. Enter a short explanation of the detail to special duty.

#### **COMPLETION OF DETAILED FROM SPECIAL DUTY - ACTION 36**

If the detail to special duty is for twenty-six (26) payrolls, this action will be generated automatically to report 817.

If the detail is for a shorter time, the health department must enter action 36 on CDS 555.

The system will automatically decrease the salary by five (5) percent.

The effective date for this action is at the END OF THE PAYROLL PERIOD.

The only fields to be completed are #7 effective date requested and #8 nature of action.

The health department must submit a letter to Frankfort reflecting the completion of detail from special duty.

#### **REALLOCATION - ACTION 37**

The fields to be completed are #7 effective date requested (beginning payroll date), # 8 nature of action, remarks short explanation from and to, #11 position no code: classification and number and salary if it is affected.

The department shall change the allocation of existing positions if it is determined that the position is incorrectly allocated and there has been no substantial change in duties from those in effect when the position was originally classified. If a position is

reallocated, the employee within the class of position shall be entitled to serve with the same status obtained before the position was reallocated.

The report is generated to Report 817 until proper documentation or justification is known. A P-65 may be requested.

Refer to 902 KAR 8:060 Section 5 & 6.

### **ID CHANGE - ACTION 38**

This action generates report 817. It remains there until the information is verified. The effective date is the beginning of a payroll date.

Class and position have to be entered. If it is to be a new ID number, enter the first two digits. If you know what it should be and you have the number, enter the complete number.

On this action, you will need to check with Frankfort.

### **STATUS CHANGE - ACTION 39**

*Changing the status of an employee #13 on the CDS 555. Use if an employee changes from full-time to part-time 100 hours or part time less than 100 hours. You must mark the status that the employee is changing to with an "X" beside the correct status. In remarks section indicate what the employee is doing, e.g., changing from part time 100 to full-time. This action is only effective on a payroll date. No documentation is needed in Frankfort. If an employee is changing from full-time or part-time 100 status, annual leave should be paid as a lump sum payment and weeks of service should be removed from payroll.*

*With the changing of the regulations our personnel system will now work in unison with our payroll system. If you do not have an approval from Personnel on an employee action, you will not be able to change payroll information until you have an approved P2. In order to do this in a timely manner, we would suggest that you submit your paperwork to the Personnel Office two weeks prior to the effective date of the action you are requesting. As long as the request is received prior to the effective date or during the pay period of the effective date, your request will be processed with the effective date you requested. If it is received after the effective date of the request in the next pay period, the effective date will have to be changed to that payroll beginning date. We will no longer approve P2 actions that have been backdated. If you use an outside payroll system, you still need to have the Personnel P2 approved off before changing your payroll for that employee.*

## **HISTORY ACTIONS**

When the system was created, personnel actions were entered starting at 1988. The health department had the capability of entering personnel actions on their employee before this date.

They are entered on CDS555. At the top of the page where it says "action", the letter "H" would be used instead of "N". All actions must be entered completely and must be accurate. Once you have transmitted, your screen becomes a history action. There is NO going back to correct. It does not poll over night as the current personnel actions. It is created immediately. IT IS VERY IMPORTANT THAT YOU MAKE SURE INFORMATION IS CORRECT. Summary pages will not be in dated order if a history action is entered the summary pages are listed in the order that they are entered on the system.

## **PERSONNEL FOLDER**

***An agency must initiate and maintain a personnel file subject to state and federal audit for each employee of the local health department.***

***The folder should contain the following items:***

- 1. Application for employment.***
- 2. Notification of appointment.***
- 3. Certification appointed from, if applicable for this appointment.***
- 4. Hour and wage exemption status.***
- 5. Report of personnel actions approved or denied on individual.***
- 6. Report of performance evaluation or disciplinary actions.***
- 7. Employee position description (P-65), which shall include title of position, duties, and requirements for training and experience necessary to qualify for position and location of position.***

NOTE: Information related to FMLA or ADA actions should be kept separately, accessible only to those who have a "need to know". You should include this information in your medical file for that particular employee.

I-9 forms can be kept in a book all together.

The local health departments are now the responsible party for the main employee files. So please be sure to keep all information on all employees past and present.

Application qualifications are now processed by all personnel staff. Our number is (502) 564-3796. Should you have questions, please feel free to call us. A list and examples of every action code that you may process on the CDS555 screen start on the next page.



<b>Action 1</b>	.....	Appointment
<b>Action 2</b>	.....	Reinstatement
<b>Action 3</b>	.....	Promotion
<b>Action 4</b>	.....	Transfer In
<b>Action 5</b>	.....	Demotion
<b>Action 6</b>	.....	Suspension
<b>Action 7</b>	.....	Resignation
<b>Action 8</b>	.....	Dismissal
<b>Action 9</b>	.....	Layoff
<b>Action 10</b>	.....	Retirement
<b>Action 11</b>	.....	Death
<b>Action 12</b>	.....	Salary Adjustment
<b>Action 13</b>	.....	Extension of probation
<b>Action 14</b>	.....	Leave without pay
<b>Action 15</b>	.....	Maternity Leave
<b>Action 16</b>	.....	Educational Leave with pay
<b>Action 17</b>	.....	Military Leave
<b>Action 18</b>	.....	Name Change
<b>Action 19 &amp; 20</b>	.....	Annual & Probationary increments
<b>Action 21</b>	.....	Address Change
<b>Action 22</b>	.....	Reemployment
<b>Action 23</b>	.....	Reclassification
<b>Action 24</b>	.....	Appointment from Provisional
<b>Action 26</b>	.....	Other action
<b>Action 27</b>	.....	Return from Leave
<b>Action 28</b>	.....	Educational leave with pay
<b>Action 29</b>	.....	Medical Leave
<b>Action 30</b>	.....	Meritorious Increment – Obsolete action
<b>Action 31</b>	.....	Corrective Action
<b>Action 32</b>	.....	Transfer Out
<b>Action 33</b>	.....	Merit payment
<b>Action 34</b>	.....	Tweener – In Range Salary Adjustment
<b>Action 35</b>	.....	Detailed to Special Duty
<b>Action 36</b>	.....	Detailed from Special Duty
<b>Action 37</b>	.....	Reallocation
<b>Action 38</b>	.....	Employee Class ID change
<b>Action 39</b>	.....	Status Change
<b>Action 40</b>	.....	Transfer within agency
<b>Action 41</b>	.....	FMLA with pay
<b>Action 42</b>	.....	FMLA without pay
<b>Action 43</b>	.....	Return from FMLA
<b>Action 44</b>	.....	Educational Step Achievement Award

**Action 45**.....Medical Leave with pay  
**Action 46**.....Annual Employee Evaluation  
**Action 47**.....Employee Re-Evaluation  
**Action 48**.....Supervisory Demotion  
**Action 49**.....Voluntarily Furlough  
**Action 50**.....In-Voluntarily Furlough  
**Action 51**.....Return from Furlough  
**Action 52**.....Probationary Reclassification.